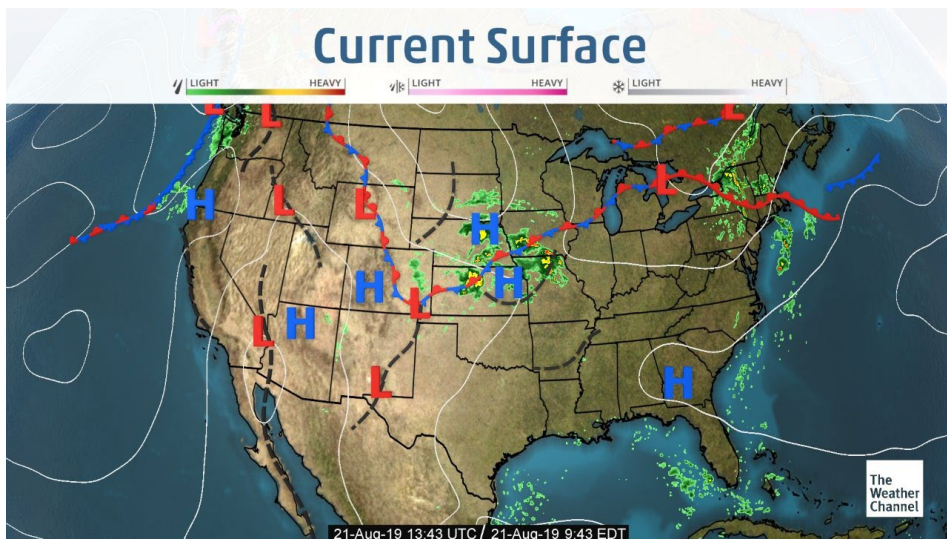


the source

Weather Update

The roller coaster in temperatures will continue out west as weak low pressure systems move through the region every few days compressing the marine layer and weakening the high pressure ridge. A tropical system off the coast of Mexico looks to stream plenty of moisture across the region into the weekend. Heavy rains and flash flooding are possible across Central Mexico with less rainfall to the north as this system meanders of the coast. A moist easterly flow across Florida will bring typical showers and thunderstorms increasing over the weekend. High pressure strengthens early next week with less moisture and warming temperatures.



Market Alerts

Apples: Expect gapping on Golden Delicious to continue. Small, low grade Fuji apples are extremely tight. WA Gala apples to start later this week/early next week.

Avocado (California): As California and Peru wrap up their season, we will enter September with a strong market. Mexico becomes the main source of supply.

Avocado (Mexican): The industry will see a strong market for the Month of September.

Citrus (Oranges): Demand exceeds supplies on small sizes oranges 113's/138's due to schools coming backing in. It is advise to send orders orders in advance to help allocate and strategize orders.

Onions: Super colossal and colossal yellow onions are limited.

Potatoes: 40 count through 70 count and #2 potatoes are limited. Advanced lead time on russet orders crucial during this time period.

Potatoes (colored): #2 grade for red potatoes remain limited.



Freight Information



Truckin' Along

California trucks remain steady again this week. Washington apple trucks are adequate as well as Idaho potato trucks. The national average on diesel dropped under 3.00 a gallon and is currently at 2.994 per gallon. California prices also dropped slightly and are currently at \$3.887 per gallon. Crude oil remained steady and is currently at \$56.59 per barrel.

U.S. On-Highway Diesel Fuel Prices* (dollars per gallon) [full history](#)

	08/05/19	08/12/19	08/19/19	Change from	
				week ago	year ago
U.S.	3.032	3.011	2.994	↓ -0.017	↓ -0.213
East Coast (PADD1)	3.055	3.034	3.019	↓ -0.015	↓ -0.188
New England (PADD1A)	3.107	3.073	3.048	↓ -0.025	↓ -0.213
Central Atlantic (PADD1B)	3.233	3.215	3.199	↓ -0.016	↓ -0.181
Lower Atlantic (PADD1C)	2.923	2.904	2.892	↓ -0.012	↓ -0.184
Midwest (PADD2)	2.942	2.924	2.900	↓ -0.024	↓ -0.229
Gulf Coast (PADD3)	2.787	2.763	2.751	↓ -0.012	↓ -0.230
Rocky Mountain (PADD4)	2.965	2.940	2.939	↓ -0.001	↓ -0.410
West Coast (PADD5)	3.605	3.580	3.564	↓ -0.016	↓ -0.142
West Coast less California	3.182	3.164	3.158	↓ -0.006	↓ -0.265
California	3.940	3.909	3.887	↓ -0.022	↓ -0.042

*prices include all taxes

A Peek at Peak Seasons

- Bell Peppers (Eastern):** Bell Pepper is in peak season.
- Berries (Strawberries):** Salinas / Watsonville declining in numbers
- Cucumbers (Eastern):** Cucumbers are in peak season.
- Eggplant (Eastern):** Eggplant is in Peak season.
- Squash (Eastern):** Squash is in peak season.

Transitions & Temperatures

- Berries (Raspberries):** Raspberry production will begin to increase over the next few weeks out of Mexico
- Onions:** Idaho/Oregon and Washington are in production with excellent quality. Limited supplies in New Mexico and California as those seasons wind down.
- Potatoes:** Norkotahs are the main variety in Idaho and other regions. Wisconsin to start next week.
- Potatoes (colored):** Wisconsin has started up with limited volume. Idaho has begun with light supplies of red; expecting better volume first week of September.



Commodity Updates



APPLES

Eastern Region:

New York

We are beginning to see 'Early' Reds (Paula Reds, Jersey Macs) along with Ginger Golds. It is very light volume and many shippers are not able to commit to loading volume this week. 'Late' Reds (Jonamac, McIntosh, and Gala) are starting early to mid-September.

Michigan

Ginger Golds are available but are very light in volume. Also, Paula Reds have started, but shippers have limited volume until next week. Look for McIntosh, Gala, Jonamac, Golden Del., and Honeycrisp to start early to mid-September.

Western Region:

Washington

The apple market is active! Most shippers are gapping on Golden Delicious and even fewer shippers able to sub Ginger Golds/Gold Supreme. New crop, Golden Del. apples are not expected until the second or third week of September. Many shippers are reaching the end of their stored product (Golden Del., Fuji, Gala, and some with Red Del.). Shippers were expected to start packing new crop, Royal Gala apples this week, but orchards are yielding to smaller sizes in the Yakima area. Growers are hoping that by holding off harvest, the apples will size up.

For most of the contiguous United States, schools are back in, with remaining schools opening between now and after Labor Day. Many big, retail box stores are capturing a high percentage of small fruit for their bagged apple needs. Flexibility on subbing sizes/grades/varieties is essential—especially on smaller, foodservice sizes (113ct, 125ct, and 138ct). Know that some orders may require an extra pickup location due to some shippers not having the full line up of varieties.

California

CA Gala apples are still available and command lesser money than Washington product. CA Granny Smith apples should start late August/early September with Fuji's available mid-September.

Chilean Pink Lady – 70-90ct XFCY (available)

*High color—FOB L.A.



ASPARAGUS

Central Mexico (Guanajuato) production continues to decrease due to seasonality. This region has begun to close fields, and yields are diminishing. This region should be finished in 7-10 days with their production. Both regions in Peru are struggling with production due to colder than usual temperatures in both regions. The larger sizes are still limited in Peru due to the cold temperatures. Markets on both coasts are still very active, especially on the larger sizes.



AVOCADO (CALIFORNIA)

Inventories continue to reduce daily. With the harvest winding down for the season, there is a growing demand for Mexican fruit on the west coast. Quality on California fruit has been great and will finish the season strong with excellent internal and external quality. Fruit cuts well and eats great with decent shelf life. Peruvian volume continues to decrease as well as quality. Late season fruit has a short shelf life and is exhausted.



AVOCADO (MEXICAN)

Rain continues to hit the growing region of Michoacan, Mexico with temps in the 70's. The industry is seeing stronger demand for Mexican fruit on all sizes and grades. The size curve is leaning to smaller sized fruit with a small percentage of #2 fruit. Come September, we will dip into new crop "Aventajada" fruit. With Mexico being the main source of fruit. The market will remain strong for the month of September until Chile can provide some relief.



BELL PEPPERS (EASTERN)

Green Bell pepper is in good supply across the northern tier of the country. Michigan, Ohio, New Jersey and Pennsylvania are all shipping good supplies of bell pepper. Rain in the mid-west and northeast has slowed harvest this week but this weather pattern should clear by the latter part of the week in time for weekend shipping. Quality remains good in the mid-west. The eastern pepper has been through more heat and growers have been harvesting for a longer period of time, so some of the product is having issues with bruising and turning color.



Commodity Updates



BELL PEPPERS (WESTERN)

Green Bell Pepper- Moderate supplies of green bell pepper being harvested in Bakersfield, CA and in the Fresno, CA growing area. Mostly choice grade continues to be packed. Very light supplies of large and extra-large retail grade bell pepper being packed. Quality on green bell pepper from these areas is good. Choice grade Green bell pepper supply meets demand. Retail grade green bell pepper demand currently exceeds supply. Green bell pepper harvest has also started in the Hollister and Oxnard growing area this week. Green bell pepper from Mexico is also available to load in San Diego, CA and McAllen, TX.

Red Bell Pepper- Light supplies of red bell pepper will continue to be harvested in the Bakersfield and in the Fresno growing area this week. Mostly choice grade currently being packed from these districts. Quality from Fresno and Bakersfield is mostly fair. Market on red bell pepper is steady/high. Light supplies of Red bell pepper also available to load in McAllen, TX.

Yellow Bell Pepper- Light supplies of yellow bell pepper being harvested in the Bakersfield and Fresno Growing area. Majority of yellow bell is being packed into choice grade. Light supplies of choice grade yellow bells are expected to continue through the week. Market on yellow bell peppers is expected to remain steady. Yellow bell pepper from California is mostly fair to good. Light supplies of Yellow hot house bells are also available to load in McAllen, TX.



BERRIES (BLACKBERRIES)

Blackberries are in better supplies this week as moderate increases out of the West Coast are helping to fill the demand. Mexico fruit is beginning to pick up in numbers as we approach September. Look for the market to remain steady through this week. Quality varies are mostly good but some reports of red cell and early breakdown have been noted upon arrival.



BERRIES (BLUEBERRIES)

Blueberries continue to be available out of the Pacific North West, California, Michigan, and North Carolina. The market remains steady with some shippers offering deals for volume orders. Quality has been good. Look for Mexico to begin production in a few weeks as well.



BERRIES (RASPBERRIES)

Raspberries are in better supplies this week as we see West Coast numbers slightly up accompanied by the crossing of additional fruit coming out of Mexico. Quality has been generally good but some reports of leakers and soft fruit have been made. Look for the market to remain steady with slightly lower overtones as we move into the weekend.



BERRIES (STRAWBERRIES)

Strawberries remain in relatively light supplies as we see the decline in plant production out of Salinas and Watsonville. This decline is normal for this time of year due to the plant varieties nearing the end of their seasonal cycles. Santa Maria numbers should increase slightly to offset this reduction in numbers up North as some growers are going into some new crop fields. This production should slowly increase over the next few weeks. Quality in the Northern regions remains just fair with frequent reports of bruising and full red berries coming from the vast majority of shippers. Look for the market to remain firm with slightly higher undertones as we wait for the Santa Maria area to pick up in production.



BROCCOLI

Broccoli supplies are plentiful as the recent warm weather has brought fields forward the last couple of weeks. Quality is fair with slight purpling, some mechanical damage and occasional yellow cast.



Commodity Updates



BRUSSELS SPROUTS

The brussels sprouts market continues to get stronger as fields are currently gapping from the recent warm weather. Internal Decay is also causing lower yields. Look for the Brussels sprouts market to continue to adjust going into next week.

CARROTS

The California carrot market remains steady with good supplies available for processed and tabletop varieties. Back to school business has increased numbers of the processed whole peeled snack packs being sold. The Mexican Jumbo carrot market is coming off slightly due to the availability of local carrots in Colorado and Eastern Canada. Quality has been reported good in all areas

CAULIFLOWER

Cauliflower supplies are plentiful as fields have come forward and yields have improved. The quality is good with minor bruising and yellow cast with weights in the 25 to 28-pound level. Look for the market to continue to adjust going into next week.

CELERY

School business has picked up, and this has made this commodity more active in the marketplace, compared to past weeks. Small sizing, thirty-six counts, in particular, will be the least available with shippers. This pack size will be on the lighter side for the rest of the week. There is enough small sizing celery expected however to meet the demand for this week. Production continues out of Salinas and Santa Maria/ Oxnard. The quality continues to be very good. Minimal defects being reported to include insect damage, slight bowing and mechanical. The weights are averaging fifty-one to fifty-five pounds per case.

CHILI PEPPERS

Jalapenos- Good supplies of Jalapeno available to load in Los Angeles from Mexico and California. Jalapeno is being harvested in Baja California where the quality is good. Domestic jalapeno is also being harvested in Santa Maria, CA. Mostly medium to large size are available from both regions. Market on jalapeno has maintained in teens this week. Jalapenos from Mexico are also available to load in McAllen, Texas.

Pasilla- Good supply of Pasilla peppers available to load in Los Angeles from Mexico. Pasilla is being harvested in Baja California. Quality on Pasilla from this region is mostly good. Size on the pepper is mostly medium to large. Market on Pasilla is Higher/steady. Pasilla from Mexico also available to load in McAllen, Texas.

Anaheim- Good supply of Anaheim available to load from Baja California and Santa Maria. Quality from Baja and Santa Maria is mostly good. The market for Anaheim is in the mid-teens and is expected to stay there through the week. Anaheim from Mexico also available to load in McAllen, Texas.

Serrano – Good supplies of Serrano peppers available to load in Los Angeles, from Mexico. Supplies are expected to remain steady throughout the week. Supplies currently meet demand. Price on Serrano pepper is currently in the high teens and is expected to remain the same through the week. Serrano supplies also crossing through McAllen, TX.

Tomatillo – Husk tomatillos are available to load in Los Angeles, from Mexico. Quality of husk variety is good. Good supplies on husk tomatillos are expected to continue through the week. The tomatillo market has remained steady on both husked and peeled. Both Husked and Peeled tomatillos have remained steady in the teens. Both varieties of tomatillos also available to load in McAllen, TX.

CILANTRO

The cilantro market continues to be strong with signs of relief as supply is getting a little better. The cilantro quality is fair with an occasional yellow leaf. Look for the cilantro market to continue to adjust going into next week.



Commodity Updates



CITRUS (LEMONS)

We'll have another good week on lemon supplies, with the majority being imported fruit out of both coasts. Market prices on small size fruit continue to soften up, looking at mid \$20's to low \$30's on choice and fancy fruit. Offshore supply continues and has been helping offset domestic supplies. We're hearing great feedback on the export quality. Please let us know if you have any interest.



CITRUS (LIMES)

The lime market will remain relatively firm while demand exceeds supplies on 175ct and larger. This is based on the presence of fewer crossings and decreased availability for this time of year. Rains in Veracruz and Michoacán this week have put an even bigger damper in an already tight market. These trends will remain consistent until late August/early September when the new crop officially begins. The new crop will peak on small sizes, beginning with 250/230's. With fewer trucks crossing and less product available, please expect layovers and loading delays.



CITRUS (ORANGES)

Domestic Valencia supplies are very limited on the small sizes 113's & 138's. With schools back in session, we're experiencing a high demand for the small fruit. We advise placing orders in advance to help strategize and secure the fruit. Markets are firm in the high teens and we could see a lift in markets as demand increases. If you have options to take import Navels to help offset please let us know. Supplies on import Clementine Mandarins on both coasts are snug, it's best to prebook in advance. Grapefruit supplies are looking plentiful through the summer with plenty of opportunities to push volume.



CUCUMBERS (EASTERN)

Cucumber supply is good and demand has gotten much better over the past week. Cucumber supply is coming from many different regions in the mid-west, northeast, and Canada. Although rain over the past week has slowed harvest and some shippers are scrambling to cover orders. Quality has been good for most shipments. Some older fields have shown occasional scaring and light color. Pricing has been steady and may increase by the weekend.



CUCUMBERS (WESTERN)

The cucumber market remains high and is expected to remain high throughout the week. West coast cucumbers are currently being harvested out of Baja California. Moderate supplies of cucumber being produced by the Baja district. All sizes and pack styles currently being packed. Demand is currently exceeding supplies on both retail and foodservice quality. Quality from Baja is good. Cucumbers from Mexico are also available to load in Nogales. The quality of cucumber arriving in Nogales is good. Light supplies of Mexican cucumbers is expected to continue through McAllen. Cucumber quality from McAllen is good.



EGGPLANT (EASTERN)

There is enough eggplant supply, even though there is not the number of packages being harvested now as there were in spring. Demand is low in the summer and there is enough supply to take care of orders. Eggplant is being shipped from Michigan, Ohio, New Jersey and Pennsylvania but none of these growing regions has huge volume. Quality is good for most areas and there is still some product coming from the Carolina's but quality only fair in this region.



EGGPLANT (WESTERN)

Light supplies of eggplant available to load in Los Angeles. Eggplant continues to be harvested in the Bakersfield and Fresno, CA district. Mostly choice grade supplies of eggplant are expected to be packed through the week. Light supplies fancy grade eggplant expected to be packed. Quality on domestic eggplant is currently fair on retail grade and good on choice grade.



Commodity Updates



GRAPES (GREEN)

We are seeing better volumes this week on all varieties of green grapes. Great Green, Ivory, and Princess are just a few varieties that have ramped up in production. Overall, there is good quality fruit on the market. Look for a steady market going into September as the Central Valley will be in peak season.



GRAPES (RED)

Flame seedless grapes are tapering off and just about done. Quality has declined as we are seeing some breakdown on this specific variety. There is still a fair amount of flames on the market. As we are transitioning into other varieties of red seedless, growers are chasing a premium on new crop fruit. There is too much fruit pumping into the pipeline and has caused the market price to level across the board. Scarlet, Krissy, and Magenta are some of the varieties in the current pack out. As we head into September, growers will hit their peak in production.



GREEN ONIONS

The green onion supply continues to be plentiful with the recent nice weather in Mexico and Salinas. The cooler weather in April/May is causing occasional leaf minor. The market will continue to stay steady going into next week.



KALE

The kale market continues to remain steady as supplies continue to stay plentiful. Quality is fair with full bunches and an occasional yellow leaf being reported due to the recent heatwave.



LETTUCE ICEBERG

This market is active. With schools opened up across the nation, demand has picked up on the value-added side as well as carton lettuce business. Mexico has had hail storms and overall erratic weather in their growing regions. This has caused yields to be minimal and has put a great-

er demand on production in both northern and southern California. The weather continues to be optimal for growing conditions in California. Yields are good with most shippers. Aside from slight misshapen heads, mechanical, and insect damage being reported, the quality continues to be strong. Weights on this commodity are reported at 42-45 pounds.



LETTUCE LEAF

The romaine market is active. Suppliers are in a planting gap that should last seven to ten days. Salinas and Santa Maria continue to be the main growing regions for this commodity. The overall quality continues to be good with minimal fringe burn, mechanical and insect damage. Suppliers are reporting weights at thirty-six to thirty-nine pounds. Romaine hearts will be light in availability throughout this week as well. Green and red leaf, as well as butter, are commodities that will have good availability throughout the week. Demand is average at best. The quality of green and red leaf, as well as butter, continues to have favorable quality reports. Aside from occasional mildew, fringe burn, and insect damage, these defects are minimal. The weights on green and red leaf are averaging twenty-three to twenty-seven pounds per case.



LETTUCE TENDER LEAF

Tender Leaf supplies continue to be plentiful as the weather in the Salinas Valley continues to spur growth and produce better yields. Curly parsley, spinach, and arugula have reacted to the recent warm weather and supplies look to be in good shape going into next week. Quality is good with occasional yellowing and bruising of the tender leaves.



MELON (CANTALOUPE)

Weather in the San Joaquin Valley has temps this week in the 90's-100's. Plenty of opportunity on large fruit. Seeing very good supplies on large fruit for the remainder of the week. Small fruit, we are seeing good supplies at the start of the week but will tighten up going into the weekend. Brix levels are ranging from 10%-13% with great internal and external quality.





MELON (HONEYDEW)

Temps in the San Joaquin Valley are ideal for melons ranging from 90's-100's. Good volume on large fruit with plenty of opportunity buys available. There are good offerings on small fruit in the front part of this week but will tighten up going into the weekend. Excellent quality internally and externally.



MELON (WATERMELON)

Watermelon is currently being harvested in Central California. The seedless watermelon market is steady with steady demand. Watermelon quality out of California is good.



ONIONS

Northwest onions in Idaho/Oregon, as well as Washington, have started up on all three colors. Quality is excellent and the supply is good. Size profile on yellow is leaning heavily to jumbo and medium size. Super colossal and colossal yellow in Idaho/Oregon are limited with higher markets. Washington is not quoting super colossal yellow and limited on colossal yellow. Red onions are plentiful while whites are limited but meeting current demand. The California season is quickly coming to a close with a few jumbo and medium yellows left and a good supply of jumbo reds that shippers are looking to clean up this week. New Mexico is also looking to finish up with all three colors and sporadic sizing. Very limited supplies of super colossal and colossal yellow.



PEARS

Washington:

New crop, Washington Bartlett pears are now available while stored and Green Anjou pears are winding down. We should see red pears become available late next week/first week of September (light volume).

California:

Plenty of aggressive prices available on CA-Bartlett pears. Load volume on CALIFORNIA BARTLETT with BOSCO PEARS pricing out much higher with less volume. ASIAN PEARS are starting up; 10ct-24ct available to load in the San Joa-

quin Valley. We should see smaller sizes by the end of next week (66ct-96ct, 3-layer). Also, 1/2 carton, 20# and 40# tissue wrap red pears (Starkrimson) are available.



PINEAPPLES

Pineapple supplies will continue to remain tight. The crownless pineapples on all sizes will be very limited out of the east coast, along with 7ct out of the east coast. Subbing orders will be limited if shippers are able to do so. Industry-wide on both coasts is expected to be in a very tight situation until the 2nd week of September. Most customers have been understanding of the situation and flexible with subbing sizes around to fulfill orders in full.



POTATOES

Very limited numbers of Burbanks remain in Idaho and will finish for the season by week's end. New crop Norkotahs are the main variety out of Idaho and other regions. New crop Norkotah's are showing excellent quality with the size profile leaning to 80 count and smaller. Markets are high to start as suppliers get started with fresh run potatoes and the new harvest. Larger size 40 count through 70 count along with #2's are limited. New crop Norkotah #2 grade are scarce due to the high volume of #1 grade product being produced in the fresh run potatoes. Suppliers will be subbing into carton counts for #2's to fulfill orders. Typically a 50 count to 70 count will be used for 10oz #2's and 90 count to 100 count will be used for 6oz #2's. We may see some minor quality issues in the new crop Norkotahs in the way of skinning, white mold, wet potatoes (wet boxes), and soft potatoes. Washington continues to produce steady volume. Colorado supplies are limited with Wisconsin starting up next week. Please continue to send advanced orders (at minimum 72 hours) prior to ship date over the next 3-4 weeks as we move through the transition.



 **POTATOES (COLORED)**

Color potatoes have stabilized as supplies are improving in new crop regions while some of the shorter season areas have finished up. #2 product remains limited; in particular on the reds. Stockton continues to produce all three colors with good quality. New crop Washington and Minnesota are going on red and yellow while Wisconsin has just started up for the season. Idaho is producing some small numbers of red potatoes and expect to start up with some good supplies of red and yellow potatoes by the first week of September. Texas has finished up for the season along with Delaware reds. We anticipate volume to increase over the next several weeks with slowly declining markets.

 **SQUASH (EASTERN)**

Squash supply is very good from various shipping points in the east. Demand has been good and although there are many players in the game this time of year rain has slowed harvest in the mid-west and northeast. Michigan and Ohio are two of the bigger shipping regions this time of year and it has been unseasonably cool, slowing production. There are many locations shipping squash in the east, from the mountains of North Carolina and Tennessee, Pennsylvania, New Jersey, and Connecticut. Quality is good in most regions, the cooler weather in the mid-west has produced good color, the mountains have had good weather and quality is good but production is down, the northeast has been hotter than normal and is in good production keeping pricing in check.

 **SQUASH (WESTERN)**

Both Italian and yellow straight-neck squash continue to be harvested in Santa Maria, Fresno, and Baja California. Better supplies on both Italian and yellow s/n squash are expected from the Santa Maria district with better weather in the growing area. Better supplies also expected from the Baja district. Light volume continues from the Fresno growing region. The market on soft squash is currently steady. Quality from all California growing districts on both Italian and yellow s/n are mostly good. Quality from Baja is also good. Good supplies are expected to continue on both Italian and Yellow S/N through the week. Light supplies of Italian and yellow s/n continue to be available to load in McAllen, TX where markets have also increased.

 **STONE FRUIT**

Over the past week, we've seen a reduction in availability on many California stone fruit commodities. Growers and shippers, in the Central San Joaquin Valley, have had to contend with hot days, low pack-outs, and an upwards climb in overall pricing.

Yellow peaches seem to be the only plentiful item with good volumes. Nevertheless, we have seen a very limited supply on small fruit—especially on 70ct. For the most part, these are non-existent and the few available are going into bag programs for retail. This has greatly reduced the amount of open market fruit.

Yellow nectarines and white flesh supplies are restricted as overall pack-outs continue to come up short. FOB's, on 48 size, 2-layer trays, are ranging in the low 20's with prices fluctuating from grower to grower. Again, small supplies are non-existent due to larger sizing in the pack-outs. Currently, the smallest sizes available would be 60/64, but know that these, too, are becoming limited.

Plum pricing has spiked on 40/45 sizes and range from mid to high 20's with 30/35 size also ranging in the high 20's.

Although availability and pricing seem to be a bit challenged, overall demand for stone fruit this summer has been underwhelming. September should put Nectarine prices in the high 20's with most growers ending harvest by mid-September. Those growers, who have fruit at this time, will struggle on small sizes. Peaches and Plums are expected to be plentiful; although peaches may struggle on smaller sizes (64ct and smaller).



TOMATOES (EASTERN)

Round tomato yields in the east are collectively moderate. With most areas working through crown picks, sizing will begin to even out by September as farms get into second picks. There are multiple growing areas in play across Tennessee, Virginia, and Michigan. Quality is mixed varying between excellent and fair. Mature greens out of North Carolina are in a small gap from a heat-induced bloom drop 6 weeks ago. Virginia is in the last of their crop rotation coming back into volume the first week of September with new plantings. Alabama and Tennessee will remain in production until the first frost of the season. North Carolina and Tennessee have a steady supply of Roma tomatoes with the brunt of demand western focused on imports. Alabama, Tennessee, and Virginia farms are all harvesting light yields of grape tomatoes. There was a spike in the market last week sending FOBs above \$30 but most products were sold out. As shippers get back into supply the market has come off by nearly \$10 helping to normalize the market. Cherry tomatoes are experiencing the effects of harsh weather. As usable fruit is harvested, the finished product is limited mostly because less acreage is devoted to the crop. Supplies are expected to improve by the first week of September.

TOMATOES (WESTERN)

The threat of a tariff induced Mexico tomato shortage next year is believed to be over now that tomato producers in Mexico have been able to reach a new tomato agreement with the U.S. Department of Commerce, suspending the anti-dumping investigation keeping the market open for Mexico tomatoes for another 5 years. More information will begin to circulate this week detailing the new agreement, but for now, there is little change in the western market. California is currently working through reduced crops caused by a heatwave in June. More heat the last weeks of July is cause for concern of another supply gap during the month of September. Triple digit temperatures have produced quality issues and directly affecting the shelf life of tomatoes inhouse/in transit. Sizing has been trending large but as the heat increases farms will be challenged to pick fruit before it begins to color up and mature on the vine. Vine ripe tomato supply has improved with new farms harvesting in Baja. Eastern Mexico will have decent volume for summer out of Jalisco, San Luis Potosi, and Torreon. Romas out of Baja are crossing steadily to help meet demand. California has consistent availability, but quality is mixed. Heat in the valley is causing some scarring, sun scold, and advancing the condition of fruit in transit causing rapid maturity in color and firmness. Overall western grape tomato supply is still light in both CA and Mexico. Mainland Mexico is steadily harvesting while Baja continues to produce better quality as they move into new fields. Growing demand in the east is pressing the market upward. Production has been moderate as a whole while new farms get a slow start. Markets are forecasted to improve by the first week of September after crops have time to recover.



Commodities at a Glance



Commodity / Region	Market	Quality
Apples		
Coopersville/Belding/Sparta, MI	Steady	Fair
Hudson/Pleasant Valley/Red Hook, NY	Steady	Fair
Wenatchee/Yakima, WA and Hood River, OR	Higher	Good
Sacramento, CA	Steady/Higher	Excellent
Stockton, CA	Steady/Higher	Excellent
Chile	Steady	Good
Asparagus		
Ica, Peru to Trujillo	Higher	Good
Central Mexico	Steady/Higher	Good
Avocado (California)		
Oxnard/Ventura, CA	Steady/Higher	Good
Avocado (Mexican)		
Michoacan, Mexico	Higher	Good
Bell Peppers (Eastern)		
Seneca / Summit County, OH	Steady	Good
Ottawa / Kent / Berrien County, MI	Steady	Good
Henderson / Buncomb County, NC	Steady	Good
Bell Peppers (Western)		
Northern San Joaquin Valley, CA	Steady/Higher	Good
Berries (Blackberries)		
Watsonville, CA	Steady	Good
Salinas, CA	Steady	Good
Central Mexico	Steady	Good
Berries (Blueberries)		
Watsonville, CA	Steady	Good
Baja California, Mexico	Steady	Good
Mossyrock, WA	Steady	Good
Pitt Meadows, BC	Steady	Good
North Carolina	Steady	Good
Oregon	Steady	Good
Berries (Raspberries)		
Watsonville, CA	Lower/Steady	Good
Baja, Mexico	Lower/Steady	Good
Central Mexico	Lower/Steady	Good

Commodity / Region	Market	Quality
Berries (Strawberries)		
Salinas Valley, CA	Steady/Higher	Fair
Watsonville, CA	Steady/Higher	Fair
Santa Maria, CA	Steady/Higher	Good
Broccoli		
Oxnard/Santa Maria, CA	Lower/Steady	Good
Salinas Valley, CA	Lower/Steady	Good
Celaya Guanajuato Mexico	Lower/Steady	Good
Brussels Sprouts		
Salinas Valley, CA	Steady/Higher	Fair
Oxnard, CA	Steady/Higher	Fair
Carrots		
Bakersfield/Santa Maria, CA	Steady	Good
Cauliflower		
Oxnard/Santa Maria, CA	Lower/Steady	Good
Salinas Valley, CA	Lower/Steady	Good
Celery		
Oxnard/Santa Maria, CA	Higher	Good
Salinas Valley, CA	Higher	Good
Chili Peppers		
Northern Baja California Norte, Mexico	Steady	Good
Santa Maria, CA	Steady	Good
Cilantro		
Oxnard/Santa Maria, CA	Lower/Steady	Fair
Salinas, CA	Lower/Steady	Fair
Citrus (Lemons)		
Oxnard/Ventura, CA	Steady	Good
Merced/Bakersfield, CA	Steady	Good
Citrus (Limes)		
Veracruz, Mexico	Steady/Higher	Fair
Citrus (Oranges)		
Merced to Bakersfield, CA	Steady/Higher	Good
Riverside, CA	Steady/Higher	Good



Commodities at a Glance



Commodity / Region	Market	Quality
Cucumbers (Eastern)		
Seneca / Summit County, OH	Steady	Good
Ottawa / Kent / Berrien County, MI	Steady	Good
Cucumbers (Western)		
Northern Baja California Norte, Mexico	Steady/Higher	Good
Central Sonora, Mexico	Steady/Higher	Good
Eggplant (Eastern)		
Seneca / Summit County, OH	Lower/Steady	Good
Ottawa / Kent / Berrien County, MI	Lower/Steady	Good
Eggplant (Western)		
Fresno, CA	Steady/Higher	Good
Grapes (Green)		
Delano, CA	Steady	Good
Fresno, CA	Steady	Good
Grapes (Red)		
Fresno, CA	Steady	Fair
Delano, CA	Steady	Fair
Green Onions		
Mexicali, Baja	Steady	Good
Salinas Valley, CA	Steady	Good
Kale		
Oxnard/Santa Maria, CA	Steady	Good
Salinas, CA	Steady	Good
Lettuce Iceberg		
Salinas Valley, CA	Higher	Good
Oxnard/Santa Maria, CA	Higher	Good
Lettuce Leaf		
Oxnard/Santa Maria, CA	Steady/Higher	Good
Salinas Valley, CA	Steady/Higher	Good
Lettuce Tender Leaf		
Salinas Valley, CA	Steady	Good
Oxnard/Santa Maria, CA	Steady	Good
Melon (Cantaloupe)		
Mendota, CA	Steady	Good
Firebaugh, CA	Steady/Higher	Good

Commodity / Region	Market	Quality
Melon (Honeydew)		
Firebaugh, CA	Steady	Good
Mendota, CA	Steady	Good
Melon (Watermelon)		
Central California	Steady	Good
Onions		
Ontario, OR to Nampa, ID	Lower/Steady	Excellent
Quincy/Hermiston, WA	Lower/Steady	Excellent
Las Cruces, NM	Lower/Steady	Good
Huron/Metler, CA	Lower	Good
Pears		
Wenatchee/Yakima, WA and Hood River, OR	Steady/Higher	Excellent
Sacramento, CA	Lower/Steady	Excellent
Stockton, CA	Lower/Steady	Excellent
Pineapples		
Heredia, Costa Rica	Steady	Good
Retalhuleu, Guatemala	Steady	Good
La Virgen, Costa Rica	Steady	Good
Potatoes		
Hamer/Rupert, ID	Steady	Excellent
Quincy/Hermiston, WA	Steady	Good
Monte Vista, CO	Steady/Higher	Fair
Potatoes (colored)		
Stockton, CA	Lower/Steady	Good
Big Lake Minnesota	Steady	Good
Pasco/Tri-Cities, WA	Lower/Steady	Good
Plover, WI	Steady	Good
Rupert to Rexburg, ID	Steady	Good
Squash (Eastern)		
Seneca / Summit County, OH	Steady	Good
Ottawa / Kent / Berrien County, MI	Steady	Good
Squash (Western)		
Santa Maria, CA	Steady	Good
Northern Baja California Norte, Mexico	Steady	Good
Stone Fruit		
Madera south to Arvin, CA	Steady	Excellent

